



INFORMATION MARKETING GROUP (IMG)
IMPROVING K-12 EDUCATION THROUGH SOFTWARE

User Fee System

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User Fee System

The User Fee System is used for Assigning, Maintaining and Reporting on User Fees assigned by the District or school.

User Fee Maintenance

This menu option is used for setting up User Fee Types and the actual User Fees that will be charged to students.

User Fee Types

You must first set up User Fee types. This is a general category assigned to each fee.

Examples: Sports, Transportation, Late Book and Class Dues.

User Fees

User fees are specific instances of a fee type. A fee is charged in a specific school year, and has a payment schedule. The payment schedule helps generate invoices over the school year. A fee must have at least one payment date.

Examples: Senior Class Dues, Junior Class Dues, Tennis Fees, Basketball Fees, Regular Bus Fee, Late Bus Fee.

Search for User Fees that are already set up.

⇒ Click on the User Fee Name to modify the fee information.

The screenshot displays two main sections of the software interface. The top section, titled 'SEARCH USER FEES', contains a search form with the following fields: 'Academic Year' (set to 2010-2011), 'School' (set to IPass High School), 'User Fee' (empty), and 'User Fee Type' (with a dropdown menu showing 'Athletic Fee', 'Bus Fees', and 'Class Dues'). Below these fields are 'SEARCH' and 'CLEAR' buttons. The bottom section, titled 'USER FEE SCHEDULES', features an 'ADD' button and a table of schedules. The table has columns for 'User Fee', 'Due Date', and 'Amount'. It lists 'Baseball Fee' with due dates of 09/12/2005 (15.00) and 03/22/2006 (25.00), a total of 40.00, and 'Bus Charges 2004' with a due date of 09/30/2004 (125.00) and a total of 125.00.

User Fee	Due Date	Amount
Baseball Fee	09/12/2005	15.00
	03/22/2006	25.00
Total		40.00
Bus Charges 2004	09/30/2004	125.00
Total		125.00

⇒ Click the **ADD** button to add a new User Fee

Set up a user fee and assign a School, Academic Year, Type, Due Dates and Payment Amounts Due.

The screenshot shows two sections of a web form. The top section, titled 'CREATE A NEW USER FEE', contains the following fields: 'Description' (text input with 'Senior Class Dues'), 'School' (dropdown menu with 'iPass High School'), 'Academic Year' (dropdown menu with '2006-2007'), and 'Type' (dropdown menu with 'Class Dues'). The bottom section, titled 'PAYMENT SCHEDULE', features a table with three columns: 'Cancel', 'Due Date', and 'Amount Due'. The first row has '10/01/2007' and '\$50.00'. The second row has '12/01/2007' and '\$50.00'. Below the table are two buttons: 'SUBMIT' and 'CANCEL'.

⇒ Click the **SUBMIT** button to save the fee

User Fees

These menu options are used for charging a User Fee to students and Posting Payments made by parents.

Please note that at this time, these options are the only way to post payments and generate fee invoices.

Charge User fees

The screenshot shows a form titled 'User Fee To Charge'. It contains three dropdown menus: 'Select School' (with 'iPass High School'), 'Academic Year' (with '2005-2006'), and 'User Fee' (with 'Baseball Fee').

⇒ Select a School

- ⇒ Select the Academic Year
- ⇒ The User Fee you want to charge

Student Selection Criteria

[SEARCH](#)

ID:

Last Name:

Home Room:

Grade Level:

Gender:

Shop Week / Cluster:

Group:

Status:

Sort:

[Clear Search](#)

Report Parameters

To:

CC List:

Priority:

[SEARCH](#)

Selection Criteria: Use this to find the students you want to Charge a User Fee. You can search by Student ID, Last Name, Homeroom, Grade Level, Gender, Group, and Status.

Students Selected					
Check All Clear All					
Apply Charge	Id	Name	Grade	Homeroom	Counselor
Charged	1831	ABaxter, Cambridge	10	1205	Mrs. Gabry
<input checked="" type="checkbox"/>	2212	Abbot, Tracie	10	2202E	Mrs. Gray
<input checked="" type="checkbox"/>	10027	Adams, Emily		2214	Heifran Whatley
<input checked="" type="checkbox"/>	3199	Adams , Jennifer	12	2202E	Heifran Whatley
Charged	1799	Aiello, Jessie	11	2202E	Heifran Whatley
Charged	1169	Albertson, David	G05	2202E	Mrs. VanAuken

- ⇒ Check off the name(s) for the students that you want to invoice.

The names of students who have already been charged this fee will be indicated as Charged.

- ⇒ Click [SUBMIT](#) to record your charges.

Add Information to User Fee Description

- ⇒ Go to Add/Modify Student Biographical and click on the User Fee Account tab
- ⇒ Click on the fee to modify
- ⇒ Enter additional description
- ⇒ Click on  to record changes.

» **BILL DUE: 09/12/05**

Date Due:
Date Invoiced:
Description:
Amount:
Paid In Full:
Last Modified: 05/12/08
Modified By: jw
Cancel:
User Fee Billed: Baseball Fee

 

*Note – the additional description information will be displayed in the User Fee letter by adding the field \$UserFeeAmountDueComment\$ to the letter data.

Post User Fee Payment

School:
Academic Year:

User Fee Payment Data

First select students below, then fill in payment data here and submit.

User Fee: Invoice Date:

Invoice Amount: Payment Date:

Amount Paid: Paid In Full:

Check Number: Receipt Number:

Comment:

[Clear All Fields](#)

- ⇒ Select the school
- ⇒ Select the Academic Year
- ⇒ Select the User Fee
- ⇒ Select the Invoice date
- ⇒ Enter the Amount Paid

- ⇒ Select Paid in Full YES/NO
- ⇒ Enter the Payment Date
- ⇒ Enter a Check Number
- ⇒ Enter a Receipt Number
- ⇒ Enter a Comment

Student Selection Criteria

SEARCH

ID:

Last Name:

Home Room:

Grade Level:

Gender:

Group:

Status:

Sort:

[Clear Search](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Report Parameters

To:

CC List:

Priority:

SEARCH

Students Eligible For Payment					
Check All Clear All					
Apply Payment	Id	Name	Grade	Homeroom	Counselor
<input checked="" type="checkbox"/>	2212	Abbot, Tracie	10	2202E	Mrs. Gray
<input checked="" type="checkbox"/>	10027	Adams, Emily		2214	Heifran Whatley

Selection Criteria: Use this to find the students you want to post a payment for. You can search by Student ID, Last Name, Homeroom, Grade Level, Gender, Group, and Status.

- ⇒ Check off the name(s) for the students that you want to post a payment for.
- ⇒ Click the

User Fee Reports

There are two User fee reports.

User Fee Invoices Report

The User Fee Invoices report creates a letter that can be mailed home to parents to inform them of fees that have been assigned and balances that are due.

User fee invoices are system letters which use user fee elements. You can generate other letters using the user fee elements and other generic letter elements and print them by running the user fee invoice letter.

User Fee Invoice Parameters:

Use this to set the User Fee that you want to invoice and to select the letter template you want to use.

User Fee Invoice Parameters	
School:	iPass High School
Year:	2005-2006 ▼
Letter:	User Fee ▼
User Fee:	Senior Class dues ▼
Pay Date:	11/01/2006 ▼
Mailing Labels?	Yes ▼
Clear All Fields	

- ⇒ Select the Academic Year
- ⇒ Select the Letter Template
- ⇒ Select The User Fee
- ⇒ Select the Payment Date
- ⇒ Select Mailing Labels YES/NO

Student Selection Criteria	
ID:	<input type="text"/>
Last Name:	<input type="text"/>
Home Room:	<input type="text" value="1205"/> <input type="text" value="1209"/> <input type="text" value="1211"/>
Grade Level:	<input type="text" value="15"/> <input type="text" value="testgl"/> <input type="text" value="09"/>
Gender:	<input type="text" value="Both"/>
Group:	<input type="text"/>
Status:	<input type="text" value="Enrolled"/>
Sort:	<input type="text" value="Name"/>
Clear Search	
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z	
Report Parameters	
To:	<input type="text"/>
CC List:	<input type="text"/>
Priority:	<input type="text" value="Low"/>
<input type="button" value="SEARCH"/>	

Students Selected to Update					
Check All Clear All					
Generate Invoice	Id	Name	Grade	Homeroom	Counselor
<input checked="" type="checkbox"/>	1831	ABaxter, Cambridge	10	1205	Mrs. Gabry
<input checked="" type="checkbox"/>	1799	Aiello, Jessie	11	2202E	Heifran Whatley

Selection Criteria: Use this to find the students you want to Invoice. You can search by Student ID, Last Name, Homeroom, Grade Level, Gender, Group, and Status.

⇒ Check off the name(s) for the students that you want to invoice.

The Invoices will run and go to <My Data><My Reports>. The first page will be a list of the students who were invoiced and then there will be a letter for each student with a page break in-between. Mailing labels will also run and be listed in <My Data><My Reports>.

Output:

<h2>User Fee</h2>								
User: lpatton								
06/10/2007 2:08 PM								
<table border="1"> <thead> <tr> <th>Person ID</th> <th>StudentID</th> <th>Name</th> </tr> </thead> <tbody> <tr> <td>1966</td> <td>1831</td> <td>ABaxter, Cambridge</td> </tr> </tbody> </table>			Person ID	StudentID	Name	1966	1831	ABaxter, Cambridge
Person ID	StudentID	Name						
1966	1831	ABaxter, Cambridge						

	Count:	1	
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7912 Church Street
 Gloucester, CA 95991

Monday September 5, 2006

Dear Ms. Faye Baxter:

Your child, Cambridge is a member of the Baseball Fee program. All members are charged a fee of \$15.00 to cover the costs and expenses required to make this program available to the student population.

Our records show that \$15.00 is still outstanding. Please pay this amount on or by Monday, September 12, 2006. This will ensure that Cambridge is entitled to continue in the Baseball Fee program in the coming months.

Thank you.

Sincerely,

iPass High School

Cambridge ABaxter
 7912 Church Street
 Gloucester, CA 95991

Total: 1

User Fee Balances Report

The User Fee Balances report lists all user fees that have been allocated to a student. User Fees can be reported by owed, paid or both.

Selection Criteria: Academic year, Student ID, Grade Levels, Homeroom, Show Phone Numbers (Yes/No), Groups, Balances (Owed, Paid, Both)

Sorting: Name, Homeroom Group

Output:

iPass High School User Fee Balances		
Sort: Name	Academic Year: 2005-2006	Date: 06/10/07
Group :	Report On : Owed	

Ciriello, Ashley ID:1005 HomeRoom: 2202E Grade Level: 10
Date: 09/01/04 Charged: 15.00 Lacrosse
Date: 09/30/04 Charged: 125.00 Bus Charges 2004
Date: 11/01/04 Charged: 25.00 Lacrosse
Date: 09/12/05 Charged: 25.00 Soccer Fee
Date: 03/01/06 Charged: 45.00 Soccer Fee
Total: (235.00)

Errico, Andrew ID:1044 HomeRoom: 2202E Grade Level: 10
Date: 09/30/04 Charged: 125.00 Bus Charges 2004
Total: (125.00)

Individual Student User Fees

Go to <Add/Modify Student Biographical> Click on a student and then go to the <User Fee Account> Tab to review all fees charged to the student, to modify a User Fee or payments for an individual student.

Note: Only individuals with the Extra Security Option of “**Can Alter User fee Invoices and Payments**” assigned can change posted user fee invoices and payments.

Go to <Security System><Manage Users> to assign this privilege to an iPass user.